

# IA 1040A Iowa Individual Income Tax Short Form 2001

For full-year Iowa residents only.

## STEP 1: Fill in all spaces. You MUST fill in your Social Security Number.

Last name <b>A.</b>	Your first name/middle initial	Social Security Number
Spouse's last name <b>B.</b>	Spouse's first name/middle initial	Social Security Number

Current mailing address (number and street, apartment, lot or suite number) or PO Box

City, State, ZIP

Are your name, your spouse's name, if applicable, and your address the same as on last year's return?  
☐ YES ☐ NO

Your Occupation	
Spouse's Occupation	
Residence on 12/31/01 County No. ●	Sch. Dist. No. ●
School District Name	

## STEP 2: Filing Status: Mark one box only.

1	Single: Were you claimed as a dependent on another person's Iowa return? <input type="checkbox"/> YES <input type="checkbox"/> NO ▲
2	Married filing a joint return.
5	Head of household with qualifying person. If qualifying person is not claimed as a dependent on this return, enter the person's name and
6	Qualifying widow(er) with dependent child. SSN here. Name: SSN:

## STEP 3

### Exemption Credits

YOU  
(and spouse if  
filing jointly)

**a. Personal Credit:** Enter 1 (Enter 2 if filing joint or head of household) .....▲ X \$ 40 = \$ .....  
**b. Enter 1 for each spouse who is 65 or older and/or 1 for each spouse who is blind** .....▲ X \$ 20 = \$ .....  
**c. Dependents:** Enter 1 for each dependent .....▲ X \$ 40 = \$ .....  
**d. Enter first names of dependents here:** ..... **e. TOTAL \$** .....

## STEP 4

### Figure your income

1. Total wages, salaries, tips and unemployment compensation. .... 1. ....00  
 2. Taxable interest. If more than \$400, complete Schedule B. .... 2. ....00  
 3. Taxable dividends. If more than \$400, complete Schedule B. .... 3. ....00  
 4. Net income. Add lines 1, 2, and 3. .... 4. ▲ ....00  
 5. Federal income tax refund received in 2001. Do NOT include your Federal Tax Rebate. .... 5. ▲ ....00  
 6. TOTAL. Add lines 4 and 5. .... 6. ....00  
 7. Federal tax payment information. (a) Federal tax withheld ..... a. ▲ ....00  
 (b) Additional paid in 2001 for 2000 and any prior year. b. ▲ ....00 7. ....00  
 8. Income subject to tax. Subtract line 7 from line 6. If greater than \$100,000 you must use IA 1040 long form. 8. ....00

## STEP 5

### Figure your tax, credits and checkoff contributions

9. Tax from tables. See tax tables on pages 6-11, worksheets on page 5. .... 9. ▲ ....00  
 10. Total exemption credits from Step 3. .... 10. ....00  
 11. Iowa Earned Income Credit. (Federal credit \$ ..... X .065) ..... 11. ▲ ....00  
 12. Total credits. Add lines 10 and 11. .... 12. ....00  
 13. BALANCE. Subtract line 12 from line 9. If less than zero, enter zero. .... 13. ▲ ....00  
 14. School District Surtax/Emergency Medical Services Surtax, pages 12-13. .... 14. ▲ ....00  
 15. Fish and Wildlife Fund Contribution. \$1 or more supports the Wildlife Diversity Program. .... 15. ▲ ....00  
 16. State Fairgrounds Renovation Contribution. \$1 or more helps renovate the fairgrounds. .... 16. ▲ ....00  
 17. Keep Iowa Beautiful Contribution. \$1 or more assists beautification efforts in Iowa. .... 17. ▲ ....00  
 18. Total Tax and Contributions. Add lines 13 through 17. .... 18. ....00  
 19. Iowa income tax withheld from Box 17 of your W-2 form(s). .... 19. ▲ ....00

## STEP 6

### Figure your refund or amount due

20. If line 19 is more than line 18, subtract line 18 from line 19. This is your REFUND. .... 20. ▲ ....00  
**Mail to Iowa Income Tax Refund Processing, Hoover State Office Bldg, Des Moines IA 50319-0120**  
 21. If line 19 is less than line 18, subtract line 19 from line 18. This is the AMOUNT OF TAX YOU OWE. .... 21. ▲ ....00  
 22. Penalty. See back of payment voucher. .... 22. ▲ ....00  
 23. Interest. See back of payment voucher. .... 23. ▲ ....00  
 24. TOTAL AMOUNT DUE. Add lines 21, 22, and 23 and enter here. .... 24. ▲ ....00

**Write check to Treasurer, State of Iowa / Mail to Iowa Income Tax Processing, PO Box 9187, Des Moines IA 50306-9187**

### POLITICAL CHECKOFF.

This checkoff does not increase the amount of tax you owe or decrease your refund.

	SPOUSE ▲	YOU
\$1.50 to Democratic Party	<input type="checkbox"/>	<input type="checkbox"/>
\$1.50 to Republican Party	<input type="checkbox"/>	<input type="checkbox"/>
\$1.50 to Green Party	<input type="checkbox"/>	<input type="checkbox"/>
\$1.50 to Campaign Fund	<input type="checkbox"/>	<input type="checkbox"/>

### Next year, (check one)

Would you like to receive a booklet?  
 This option is not available to electronic filers. 0. ☐ Yes  
 1. ☐ No

### PLEASE

SIGN HERE ►

SIGN HERE ►

I (We), the undersigned, declare under penalty of perjury that I (we) have examined this return, including all accompanying schedules and statements, and, to the best of my (our) knowledge and belief, it is a true, correct, and complete return. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has any knowledge.

Your Signature \_\_\_\_\_ Date \_\_\_\_\_ Preparer's Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_ Address \_\_\_\_\_

Daytime Telephone Number \_\_\_\_\_ Daytime Telephone Number \_\_\_\_\_ Identification Number \_\_\_\_\_

- Verify your Social Security Number(s)
- Recheck your math
- Attach all W-2s.

This return is due April 30, 2002.

41-080 (2/27/02) **S01**



# IA 1040A Schedule B

## Interest and Dividend Income

Name(s) as shown on page 1 of the IA 1040A	Social Security Number		

**Note:** You must report all taxable interest and dividends on IA 1040A, even if you are not required to complete Schedule B.

**PART I:** You must complete Part I if you received more than \$400 in interest in the tax year. Interest income which should be reported includes earnings from savings and loan associations, mutual savings banks, cooperative banks, credit unions, and bank deposits; State and municipal bonds, and interest from tax refunds. Do not report interest from Federal securities.

**INTEREST**

**INCOME** **Interest Income.** List Names of All Payers.

Name of Payer	AMOUNT
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
<b>Total Taxable Interest Income.</b> Add the amounts; enter here and on IA 1040A, line 2. ....	.00

**PART II:** You must complete Part II if you received more than \$400 in gross dividends in the tax year. Deduct that portion of any net dividend from mutual funds that is attributable to Federal securities.

**DIVIDEND**

**INCOME** **Dividend Income.** List Names of All Payers.

Name of Payer	AMOUNT
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
	.00
<b>Total Taxable Dividend Income.</b> Add the amounts; enter here and on IA 1040A, line 3. ....	.00